

Chapter 3:

Creating the 4-1-1

In this chapter, you will ...

- [1]** *Identify the elements of the 4-1-1 Action Goal Worksheet*
- [2]** *Create a 4-1-1*

The 4-1-1 Elements

Format of the Worksheet

Instructor

Take a few minutes to walk through each section of the 4-1-1 worksheet. Remind participants that “Job” goals are the ones participants will do individually. “Business” goals are the goals participants and their teams will do together.

The 4-1-1 process is a practical system that drives your goal-setting and helps you structure your time, resulting in greater accomplishments.

The 4-1-1 Action Goal Worksheet is formatted to guide you as you define goals for 1 year, 1 month, and 4 weeks in the categories of Job, Business, Personal Finance, and Personal.

4-1-1 ACTION GOAL WORKSHEET			
Name:			
MY ANNUAL GOALS			YEAR OF XXXX
Job	Business	Personal Financial	Personal
1) 2) Record your personal annual Big Rock goals for your job here.	1) 2) Record your key annual business goals.	1) 2) Record your personal financial goals here.	1) 2) This includes but is not limited to your annual personal education goals here.
MY MONTHLY GOALS			MONTH OF XXXXX
Job	Business	Personal Financial	Personal
1) 2) Record your personal monthly goals and actions for your job here.	1) 2) Record the key monthly business goals and actions here.	1) 2) Record what you will do each month for your personal finances.	1) 2) This includes but is not limited to your monthly personal education goals and actions. Plan well. You want to burn up, not burn out!
MY WEEKLY GOALS			
Dates	Dates	Dates	Dates
Job 1. Business 1. Personal Financial 1. Personal 1. What specific activities must I do this week to stay on track with my Big Rocks?	Job 1. Business 1. Personal Financial 1. Personal 1.	Job 1. Business 1. Personal Financial 1. Personal 1.	Job 1. Business 1. Personal Financial 1. Personal 1.
Notes:	Notes:	Notes:	Notes:

Types of Goals on the 4-1-1

Annual Goals

You should set aside 1–3 days each year to think about and crystallize these one-year goals.

Again, you must get clear on your Big Rocks. From these, identify 5–7 key goals that you must achieve in order to feel that you have had a successful year. These are written in terms of “gauges.” Gauges are those goals that act as measures of your intended results (e.g., “I want to double my last year’s production.”).

Annual goals should reflect each of the key areas of your life. There can be many categories, but we have found the following categories to be most useful:

- Job – What will you do?
- Business – What will your business or team do?
- Personal Financial – What improvements do you desire in your net worth (reduced liabilities, increased investments, increased assets, etc.)?
- Personal – What do you desire to have happen personally (health, family, spiritual, educational, etc.)?

Monthly Goals

You should set aside 1–3 hours each month to rethink and further refine your monthly goals.

Focus on your methods of achievement: How will you position yourself in pursuit of your annual goals? Begin by breaking your annual goals down into their monthly increments. In addition, write down the key activities that will lead to those monthly results.

When deciding your monthly goals, remember to put first things first. Goals that other goals hinge on have higher priority. You should have no more than 5–7 monthly goals. Do not plan any more than one month ahead.

Instructor

To help explain the concept of “gauges” (annual goals) and “levers” (weekly goals), use the analogy of a car’s speedometer as a gauge and its accelerator pedal as a “lever.”

Instructor

Breaking annual goals into realistic monthly goals, gives participants a picture of how reaching annual goals is possible.

Weekly Goals

You should set aside ½–1 hour each week to form goals for the coming week. Plan one week at a time, taking into account what was accomplished the week before.

Instructor

To help the participants think about their 4-1-1s, review with them these three basic questions.

Weekly goals are all “levers”—actions or activities. Levers are those goals that are the mechanisms or specific how-to’s of achievement (e.g., “I will contact 10 people each day.”). These weekly goals are the steps you will take toward your monthly and annual goals. Levers are the means to the ends.

Your weekly goals, like all your monthly and annual goals, are not a to-do list, but rather a have-to-do list. Decide what you must do that week to achieve your monthly goals, again remembering to put first things first. And limit your number of weekly goals to no more than 6–8 key, measurable activities.

Questions to Ask

Before you start filling out your 4-1-1, you should focus on the goals that matter most to you. Here are some things to address:

- **What** is it that you want to accomplish?
Start with the end in mind. Be specific about what you want; vague goals will yield inconsistent results.
- **How** are you going to achieve your goals?
You should have a clear idea of what strategies and activities will help you realize your goals. If you are unsure, consult with someone who can help you get clarity.
- **When** are you going to accomplish these things?
Your time frame should be laid out on your calendar. Time blocking is the key to avoiding distractions and to focusing your energy. We’ll discuss time blocking in chapter 4.

Samples

See the appendix of this training manual for sample 4-1-1 worksheets for different KW roles.

Create Your 4-1-1

Exercise

Create a 4-1-1 Action Goal Worksheet

Directions:

1. Consider your 20 percent and select one of your Big Rocks for this exercise.
2. Turn to the blank 4-1-1 Action Goal Worksheet on the next page.
3. Define annual, monthly, and weekly (one week only) goals related to this Big Rock.
4. Remember to write SMART goals.
5. If you need more space, use the back of the page.

Time: 30 minutes

Instructor:

Give participants a 2-minute warning before coming back together as a class.

4-1-1 Action Goal Worksheet Form

4-1-1 ACTION GOAL WORKSHEET			
Name: Your Name			
MY ANNUAL GOALS			YEAR OF XXXX
Job	Business	Personal Financial	Personal
1) 2)	1)	1)	1)
MY MONTHLY GOALS			MONTH OF XXX
Job	Business	Personal Financial	Personal
1) 2)	1)	1)	1)
MY WEEKLY GOALS			
Jan. 3-7	Jan. 10-14	Jan. 17-21	Jan. 24-28
Job 1. 2.	Job 1. 2.	Job 1. 2.	Job 1. 2.
Business 1. 2.	Business 1. 2.	Business 1. 2.	Business 1. 2.
Personal Financial 1. 2.	Personal Financial 1. 2.	Personal Financial 1. 2.	Personal Financial 1. 2.
Personal 1.	Personal 1.	Personal 1.	Personal 1.
Notes:	Notes:	Notes:	Notes:

You will find additional blank 4-1-1 worksheets in the back pocket of your training manual.

Instructor

Ask participants to commit to being passionate about their 4-1-1s for 21 days to set the habit.

Polishing Your 4-1-1 Worksheet

The 4-1-1 is a powerful time management and goal-setting tool, but the process may seem unnatural. As we discussed, the 4-1-1 is about moving from E to P—from what comes naturally to what comes unnaturally, from enthusiastic good fortune to systematic success.

Avoiding Common Errors

Consider and work to avoid these common errors when creating your 4-1-1:

1. Weekly goals that do not correspond to larger monthly goals
2. Monthly goals that do not correspond to larger annual goals
3. Goals that are not SMART (Specific, Measurable, Action Oriented, Realistic, and Time Bound)
4. Weekly goals that are really to-do tasks rather than have-to-do goals
5. Planning weekly goals/activities more than one week in advance
6. Annual goals that are more likely “Someday” goals (that is, they are not realistic for a twelve-month time period)
7. The temptation to revise goals set in prior weeks or months—to reflect new goals or missed goals, for example

Exercise

What's wrong with this picture? Let's review a 4-1-1 Action Goal Worksheet with a critical eye.

Directions:

1. Form groups of 4–6.
2. Review the sample 4-1-1 on the next page. There are at least five ways the 4-1-1 could be SMARTer, making it a more effective tool. Review the characteristics of SMART goals.
3. Identify (at least) five problems with the 4-1-1 and ways to fix the problems.
4. Identify a group spokesperson. Your instructor will ask you to report some of your conclusions.

Time: 10 minutes

Mega Agent 4-1-1:

- A. *Annual Job Goals*—"100 Seller Listings" is a desired result more than an action goal. How will the agent make this happen? "Recruit a Buyer Specialist" suggests the agent will recruit all year but will never hire. "Attend classes" and "Create new marketing plans" are not SMART. Which classes? When? How many marketing plans?
- B. *Monthly Job Goals*—"8 seller listings" is too low. Remind participants to take their annual goal numbers and divide by 10 to determine good monthly goal numbers. "Leads" is not a SMART goal. What are the goal numbers? "Attend class" is not a SMART goal. Which classes? When?
- C. *Monthly Business Goals*—"Take 4 buyer agreements" ... Does the Mega Agent intend to do this himself/herself? The Buyer Specialist has not yet been hired. The goal of 4 agreements a month is low. Divide the annual goal number (50) by 10 for a good monthly goal number.
- D. *Weekly Job Goals*—"Add 10 to Have Met Database" is a goal that does not have correlating monthly or annual goals. "Go on 2 listing appointments" is a low target. "Provide 2 buyer leads" ... to whom? The Buyer Specialist is not yet in place and performing.

Mega Agent 4-1-1 (with errors)

4-1-1 ACTION GOAL WORKSHEET			
Name: Mandy the Mega Agent			
MY ANNUAL GOALS			YEAR OF XXXX
Job	Business	Personal Financial	Personal
1) 100 seller listings 2) Recruit Buyer Specialist 3) Attend classes 4) Create new marketing plans	1) Hire 2 nd assistant 2) Take 50 buyer agreements		1) Lose 15 pounds 2) Complete a course in conversational Spanish
MY MONTHLY GOALS			MONTH OF XXX
Job	Business	Personal Financial	Personal
1) 8 seller listings 2) Recruit Buyer Specialist 3) Leads 4) Attend class	1) Take 4 buyer agreements		1) Attend jazzercise twice a week 2) Research local colleges and training centers for Spanish courses; submit application(s).
MY WEEKLY GOALS			
Jan. 3–7	Jan. 10–14	Jan. 17–21	Jan. 24–28
Job 1. Add 10 to Have Met Database 2. Go on 2 Listing appointments 3. Provide 2 Buyer leads Personal Attend jazzercise M–W Call MCC regarding Spanish course in March	Job Business Personal Financial Personal	Job Business Personal Financial Personal	Job Business Personal Financial Personal
Notes:	Notes:	Notes:	Notes:

My Scorecard

Exercise

Directions:

We have reached the end of this chapter! Before we move on, take five minutes to assess your mastery of the chapter's objectives.

1. Refer to the My Scorecard sheet located at the back of this manual.
2. Review the topics for this chapter.
3. Grade yourself (A–F) on your mastery level of each topic. Be honest with yourself. At the end of this course, you will use this scorecard to evaluate your weak areas and develop an action plan for complete mastery of the subject matter.

Time: 5 minutes
